REQUEST FOR QUALIFICATIONS

MONTANA DEVELOPMENTAL CENTER
CAMPUS CONCEPT PLAN
& PRELIMINARY ARCHITECTURAL REPORT

Boulder, MT
In partnership with:

September 18th, 2020
THE PROJECT BACKGROUND:

The Montana Development Center (MDC), located in Boulder, Montana provided services to a population of developmentally disabled persons in a residential environment. This extensively developed facility and the associated services had been a part of the community for more than 125 years. In 2017, the Montana legislature determined to close the facility and transition this population to dispersed residential treatment. Essentially, this decision spelled the end of this facility and its original mission. The closure of the Montana Development Center resulted in additional layoffs of nearly 200 people, and coupled with the loss of 25 positions with the closure of the Riverside Correctional Facility, lead to a total job loss within the labor market area of 225 jobs. There was also a loss of contractor support positions and a decrease of traffic to the area from families and staff services support for residents from outside the area further compounding the economic impact to the Boulder community.

The legislative action was followed by establishment of efforts to support the community response which resulted in the formation of a proactive community group called the Boulder Transition Advisory Committee (BTAC). This coalition of stakeholders began the process of getting people involved as active participants to help plan for, and shape the future of, their community. They began to identify the necessary resources to help mitigate the MDC closure and look for ways to foster new economic development opportunities and to diversify the area economy. The BTAC planning process served as the catalyst for community engagement by establishing regular meetings to discuss the future of Boulder that led to community Study Circles, developing the Making Boulder’s Future Bright Master Plan, a Downtown Master Plan, a new Growth Policy, a Recreation Complex Master Plan, a Marketing Committee, a Client Centered Services Committee, a Health Services Committee, a Recreation Committee and a Montana Development Center Reutilization Committee. The proposed MDC Campus Concept Plan and Preliminary Architectural Report (PAR) will incorporate the goals and objectives emanating from the MDC Reutilization Committee.

The project area includes two campuses that are separated by the Boulder River. The MDC Campus, which is on the north side, has primarily been used as an education facility for special needs individuals. Even up to the point of closure, the campus served a similar purpose. The MDC has a mix of residential and commercial type buildings. The South Campus was first used as an education and treatment campus for special needs individuals. However, overtime operations and services were transitioned to the MDC campus. The South Campus has several buildings that are owned by Jefferson County and Jefferson Local Development Corporation (JLDC).

Phase I & Phase II Environmental Site Assessments (ESA) are available for specific buildings on each campus. The ESA documents includes site history, previous uses, construction dates, material used, known contaminates etc. In addition to the ESA documents, infrastructure layouts and schematics that relate to each campus will be made available to the selected individual and/or firm. (Note: Other architectural and engineering files will be made available either as PDF’s or .DWG files).
The primary focus of reutilization is a veteran education support center that would provide training opportunities matched with workforce needs. The two primary areas identified with statewide shortages were related to healthcare and computer related hard and soft skills. Coordination with healthcare leadership identified a need for a veteran pain management center that would be easily matched with the facilities available at the MDC. The primary facilities that would be used to support the pain management center would be the main administrative building, the recreation center building and residential on-site housing. The infrastructure and utilization of these facilities would require a PAR to help determine financial consideration for reutilization of the facility as a multi-functional support center. The large commercial kitchen also presented an opportunity to provide logistical support to the veteran center with an expanded role of becoming a local food processing and education center that would support entrepreneurs with food product production with an expanding marketing capability.

**TASKS & DELIVERABLES:**

**Preliminary Architectural Report (PAR)**
The selected firm will be tasked with development of a Concept Plan for the MDC facilities that incorporates the adjacent South Campus property development. A PAR for the main anchor administrative building and recreation building on the MDC campus will also be a deliverable and incorporate an analysis of the existing MDC infrastructure to support the concept plan. The PAR must also be consistent with standards/uniform checklist provided by the Community Development Block Grant (CDBG) program via MT Department of Commerce.
Pertinent information will be provided to the selected consultant that will help facilitate the PAR process. For example, JLDC and Jefferson County have Brownfields assessment documents for the MDC campus, architectural and engineering schematics, and general campus layouts.

Deliverables;
- Preliminary Architectural Report;
  - Primary healthcare/hospital admin building on the MDC campus
  - Cursory review of remaining buildings
  - Consistent with CDBG checklist

North/South Campus Conceptual Plan
The campus conceptual plan should be developed with future development in mind. These plans will be thoroughly vetted through several lenses, including community goals and needs. Stakeholders will be invited to share their ideas and concepts with the design team. This process should be collaborative, lead to a shared vision, and create a transformative image for the campus.

The steering committee will pay close attention to responses that detail phased development approaches based on feedback from stakeholders. Other key considerations include visibility, access, traffic, environment, weather, views etc. Overall, the campus conceptual plan should be designed to promote vibrancy, destination, and represent the goals of stakeholders.

Scope of Work

Best Practices
Ensure the community’s interests are heard and expressed in the concept plan for the North and South Campus.

Project Management
Project management includes project initiation, staff check-in meetings, and interaction and information sharing among partners. Throughout the project period, continued efforts will be made to integrate the Concept Plan with other development activities and planning efforts occurring in the area. Suggested items to address in the proposal include:
- Project Initiation
- Staff Check-In Meetings with Headwaters RC&D, JLDC, and DEQ
- Status reports provided to Headwaters RC&D, JLDC, and DEQ
- Project Management and Monthly Reporting

Existing Conditions SWOT
Identify the strengths, weaknesses, opportunities and threats of the existing land uses, facilities, economics, infrastructure, environment, transportation and regulatory constraints of the project area. This includes stakeholder interviews and market analysis. Suggested items to address in the proposal include:
- Team Briefing Materials
- Project Kick-Off Meeting / Site Tour
- Steering Committee #1 - Kick-off
- Document Review
- Stakeholder Interviews
- Market Analysis
- Community Meeting #1 – Opportunities
• Steering Committee #2 – SWOT
• Existing Conditions Memo & Mapping

Strategic Plan and Vision
Develop a strategic plan and vision for the North and South Campuses through stakeholder involvement in community meetings, steering committee meetings and present a Vision and Strategic Plan Memo. Suggested items to address in the proposal include:
  • Community Meeting #2 – Vision & Strategic Plan
  • Steering Committee #3 – Vision & Strategic Plan
  • Vision & Strategic Plan Memo

Land Development Alternatives
Identify land development alternatives with the preferred alternative selected through Charrette, community meetings and steering committee meetings. Suggested items to address in the proposal include:
  • Charrette Preparation
  • Concept Plan Charrette
  • Community Meetings #3 and #4 – Alternatives and Preferred Alternative
  • Steering Committee #4 – Charrette Debrief
  • Charrette Follow-up Memo

Implementation Strategy
Use community and steering committee meetings data and economic benefits analysis to inform design guidelines, transportation and infrastructure, marketing, and implementation. Consultant teams should include a financial analysis of redevelopment alternatives; pro-forma by development types noting inputs and costs; capital resources and assumptions; and financial measures (NOI, DCR, LTV, IRR). Pro-forma should include potential use of economic development loans, grants and tax credits. Suggested items to address in the proposal include:
  • Design Guidelines
  • Concept Plan Update
  • Transportation & Infrastructure Plan
  • Marketing Plan
  • Implementation & Phasing Plan with Financial Analysis
  • Economic Benefits Analysis
  • Community Meeting #5 – Implementation Plan
  • Steering Committee #5 – Implementation Plan

Draft & Final Report
A community meeting, information sessions, presentations, and debriefings with stakeholders to inform the final Concept Plan and ensure seamless adoption and project closeout. Suggested items to address in the proposal include:
  • Information Sessions / Presentations to Headwaters RC&D, JLDC, DEQ and the City of Boulder
  • Draft Report and Final Presentation
  • Community Meeting #6
  • Final Report
  • Plan Adoption and Project Closeout
**Deliverables**

In addition to standard grant administration and project management reports, suggested deliverables to include in the proposal include:

- Existing Conditions Memo & Mapping
- Vision & Strategic Plan Memo and Charrette Follow-Up Memo
- Public Announcements and Community Meetings' Sign-In Sheets
- Steering Community Meetings' Minutes
- Final North and South Campus Concept Plan

*(Please Note: The consultant is required to provide 5 printed copies of the Final Plan.)*

**SCORING & SELECTION:**

The evaluation of consultants’ proposals may include, but is not limited to, the following criteria:

- Consultant’s experience with similar development plans.
- Capacity to assume new business on an ongoing basis for at least one calendar year.
- Perceived ability to meet Headwaters RC&D’s, JLDC’s, and DEQ’s requirements.
- Availability (timetable) for providing goods and/or services.
- Breadth of services available.
- Reporting capability (i.e. weekly phone calls, monthly reports, verbal reports and graphic illustrations to support reports, presentations and invoices).
- Training and professional development history.
- Compliance with Headwaters RC&D’s, JLDC’s, and DEQ’s terms and conditions.

Respondents will be evaluated according to the following factors:

**Qualifications and ability to perform requested services (50 points total)**

- Past experience with other rural concept planning projects similar in scope (25 points)
- Personnel qualifications (10 points)
- References from other communities (10 points)
- Location as it relates to the provision of services to the affected community (5 points)

**Execution of the scope of work (50 points total)**

- Proposal provides adequate public information and community dialogue (25 points)
- Proposal comprehensively addresses the scope of work (20 points)
- Proposal provides a clear, achievable and comprehensive timeline (5 points)

**Total - 100 points**

Submissions received will be reviewed by the review/steering committee comprised of designees from Headwaters RC&D, JLDC, Jefferson County, and the MT Department of Environmental Quality. These designees will be the de facto steering committee members that interface with the selected contractor.

The finalist selection will be based on an evaluation of the written responses. Interviews will be held with the top-ranked firms. The award will be made to the most qualified offeror whose proposal is deemed most advantageous; all factors considered. Unsuccessful offerors will be notified as soon as possible.
**CONTRACT DETAILS:**

- **Period of Performance** – The length of the contract shall not exceed nine (12) months of the signed contract date by all parties.
- **Payment, Incentives, and Penalties** – Payments terms shall be discussed after an award announcement and listed in the contract agreement prior to signatures by both parties.
- **Contractual Terms and Conditions** – Will be discussed between Headwaters and the awardee once an announcement has been made.
- **Funding for this project** is provided in part from a grant award from the Montana Department of Commerce Big Sky Trust Fund (BSTF).
- Remaining funding is provided by Headwaters RC&D and the MT Department of Environmental Quality.
- The awardee is expected to comply with requirements from these funding agencies. The review committee will provide, in detail, all of the expectations and desired outcomes from these entities.
- This selected consultant will have the opportunity to be retained for future aspects of this project.

**EEO & COMPLIANCE WITH LAWS:**

Consistent with the requirements of Section 3 of the Housing and Community Development Act of 1968, CDBG regulations governing the grant require that, to the greatest extent feasible, opportunities for training and employment arising in connection with this CDBG-assisted project will be extended to local lower-income residents. Further, to the greatest extent feasible, business concerns located in or substantially owned by residents of the project area will be utilized. Disadvantaged Business Enterprises are encouraged to apply.

This solicitation is being offered in accordance with federal and state statutes governing procurement of professional services. Accordingly, Headwaters RC&D reserves the right to negotiate an agreement based on fair and reasonable compensation for the scope of work and services proposed, as well as the right to reject any and all responses deemed unqualified, unsatisfactory or inappropriate.

**PROPOSAL SUBMISSION:**

Please submit the following no later than Friday, **October 19TH, 2020 at 5:00 pm.** to Julie Jaksha Headwaters RC&D, 65 E Broadway, 5th Floor, Butte, MT 59701; jjaksha@headwatersrcd.org electronic versions preferred.

1. A technical approach, which describes how you will carry out the tasks, deliverables, and scope of work.
2. A summary of your recent and relevant project and general familiarity with similar projects.
3. A firm estimate of the fees to be charged and an estimate of expenses that would be incurred, which includes a completed Budget Justification task breakdown (see Attachment B)
4. A statement of your firm’s qualifications as it relates to each part of the overall study, including general information regarding the firm’s qualifications (see Attachment A for the Validation for Consultant Form);
5. A plan outlining your proposed approach to each element of the study.

**QUESTIONS:**

Questions regarding the content of this Request for Proposals may be sent to the contact person listed in the Proposal Section via email no later than 2 business days prior to due date for proposals. Headwaters RC&D will make every effort to provide a written response within 2 business days. Whenever responses to inquiries would constitute a modification or addition to the original RFP, the reply will be made in the form of an addendum to the Request for Proposals, a copy of which will be forwarded to all Consultants who have submitted an “Intent to Respond” form (Attachment D). Consultants must submit their questions using the “Master Q & A” form found in Attachment C, and provide, at a minimum, the following:

§ Supplier’s name, requester, and appropriate contact information
§ The question, clearly stated
§ Specific reference to the applicable Request for Proposals section(s)

**AWARD:**

The review committee reserves the right to accept or reject any or all Proposals received from this RFQ, or to negotiate separately with any Proposer after any responses are open, conversations may take place for consultants for purposes of clarification regarding the selection process only. Consultants shall be bound by the information submitted in their Proposals and subsequent negotiations.

Those submitting Proposals may be required to make a presentation to the review committee as part of the selection process. The presentation team should include the Project Manager and any other key personnel necessary to address administrative and technical issues.

The review committee reserves the right to award the contract to a consultant that it deems to offer the best overall Proposal. The review committee is therefore not bound to accept a Proposal on the basis of lowest price, the review committee reserves the right to accept or reject any or all Proposals received from this RFQ. The review committee has the sole discretion and reserves the right to cancel this RFQ, to reject any and all Proposals, to waive any and all irregularities, or to re-advertise with either the identical or revised specifications if it is deemed to be in best interest.
ATTACHMENT A –

VALIDATION QUESTIONS FOR CONSULTANT

GENERAL INFORMATION
1. Company Name: ________________________________
   Address: ______________________________________
   Contact Name: _________________________________
   Contact Phone: _________________________________
   Contact Email: _________________________________
   Website/URL: __________________________________

2. How many years has your company been doing business in your industry?
3. Total full-time employees.
4. What are your standard payment terms?
5. References - Please attach a word document with all contact information for at least three references.
6. Can you provide documentation that your firm can meet Headwaters RC&D’s minimum insurance requirements?

FUNCTIONALITY
1. A certificate of insurance must be provided prior to signing the contract, commencing on the day the contract begins. Are you willing to comply with these requirements?
2. You must instruct your insurance broker/carrier to notify Headwaters RC&D should your coverage change. Are you willing to do this?

QUALITY AND SERVICE
1. Do you have a quality assurance program? If yes, please attach a copy, or a link to the document online.
2. Are your employees required to take a mandatory drug test?

LEGAL ISSUES
1. Are there any pending lawsuits against your company? (Include current mediation or arbitration matters.) If yes, please explain.
The following is a sample only.

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**BUDGET JUSTIFICATION:**

*Use extra sheets if necessary.*
Any questions regarding this Request for Proposal should be submitted according to the process outlined below. Headwaters RC&D will make every effort to answer within two (2) days of receiving the questions.

### Q&A Process

1. Prepare questions or concerns on the template provided.
2. Complete the table in full, providing a date for each question and a section of the RFP to reference (if applicable).
3. Submit the completed form via email to Julie Jaksha at jjaksha@headwatersrcd.org. Attach associated documents as necessary. Please contact Julie Jaksha at (406) 533-6780 with any questions regarding this process.

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Questions from: ___________________________  Company: ___________________________

Email Address: ___________________________  Date: ___________________________
INTENT TO RESPOND FORM

RFP: MONTANA DEVELOPMENTAL CENTER CAMPUS CONCEPT PLAN & PRELIMINARY ARCHITECTURAL REPORT

Date: ____________________________

Please scan and email the following Intent to Respond form to Julie Jaksha within two (2) days of the RFP due date.

To: Headwaters RC&D
Attn: Julie Jaksha
Email: jjaksha@headwatersrcd.org

From:

Contact Name: ________________________________
Company Name: __________________________________
Company Address: __________________________________
Company Address Line 2: __________________________________
Phone Number: ___________________________________
Fax Number: ______________________________________
Email Address: _________________________________

We intend to respond to this RFP by the specified due date:

Yes ☑ No ☑

_____________________________  __________________________
Company Name                  Date

_____________________________  __________________________
Contact Name (please print)   Title

____________________________________________________
Signature of Contact Person

By signing the above, I certify that I am authorized by the Company named above to respond to this request.